DOCUMENT RESUME

ED 117 880 95 EC 081 115

TITLE	Avenues to Change, Book 2: Implementation of Citizen Advocacy through State and Local ARCs.
INSTITUTION	National Association for Retarded Citizens, Arlington, Tex.
SPONS AGENCY	Bureau of Education for the Handicapped (DHEW/OE), Washington, D.C.; National Inst. of Mental Health (DHEW), Rockville, Md.; Rehabilitation Services Administration (DHEW), Washington, D.C.
PUB DATE	Feb 74
GRANT	OEG-0-72-5311
NOTE	57p.; For the other documents in this series, see EC 081 114-117 and EC 081 331-332
EDRS PRICE	MF-$0.83 HC-$3.50 Plus Postage
DESCRIPTORS	Administration; *Child Advocacy; Exceptional Child Services; *Guidelines; *Mentally Handicapped; Organizations (Groups); *Program Development; *Program Planning; Records (Forms)
IDENTIFIERS	*National Association for Retarded Citizens

ABSTRACT

The second of four booklets on citizen advocacy for the mentally retarded provides specific guidelines for implementing advocacy programs in state and local Associations for Retarded Citizens. Functions of the state office and the state advisory committee are reviewed, along with funding sources for state programs. Procedures involved in setting up a local office include establishing a study committee to investigate the feasibility of an advocacy program, deciding questions of insurance and incorporation, and hiring staff. Described are such local office functions as recruitment, screening, program monitoring, and service evaluation. Among nine program forms provided are a sample news release form and advocate's monthly summary. (CL)

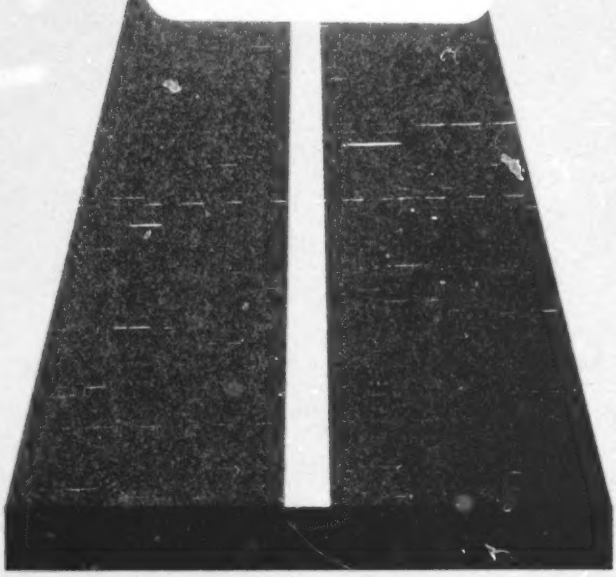
****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED117880

Implementation of Citizen Advocacy through State and Local ARCs

U.S. DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY



Avenues To Change

Book II

ECOPIES

IMPLEMENTATION OF CITIZEN ADVOCACY THROUGH STATE AND LOCAL ARCs

BOOK II

This series of materials was developed in conjunction with the NARC Project **A National Citizen Advocacy Model for Mentally Retarded Children,** Grant #OEG-0-72-5311, which was supported jointly by the Bureau of Education for the Handicapped, National Institute of Mental Health, and Rehabilitation Services Administration of the United States Department of Health, Education, and Welfare.

National Association for Retarded Citizens
February, 1974

PREFACE: BOOK II

Implementation of Citizen Advocacy Through State and Local ARCs provides specific guidelines for setting up advocacy offices, locating proteges, recruiting and training advocates, matching them to retarded children, and supervising ongoing advocacy relationships. Details are included concerning committee structure, problems that the staff may expect to encounter, qualifications for both personnel and advocates, and other information vital to those who operate Citizen Advocacy Programs, serve on their Advisory Committees, or hold membership on the Board of Directors of a sponsoring ARC.

Both beginners and those who have already started programs can gain much from this book. The functions of the advocate and how they relate to those of the office are discussed along with the psychological implications of the advocate-protege relationship. Methods of streamlining program operation are also included.

The NARC Child Advocacy Project staff wishes to express its thanks to those programs already in progress which have so generously provided information and aid in on-site visits. Especially helpful were those programs initiated with Dr. Wolf Wolfensberger's assistance in Lincoln and Omaha, Nebraska. The cooperation extended by the Citizen Advocacy Programs in Texas, New Jersey, Colorado, Florida, Pennsylvania, Ohio, Michigan, and Massachusetts is also deeply appreciated.

BOOK II

TABLE OF CONTENTS

Subject	Page Number
The State Office	5
The Director of the State Program	6
Funds for State Programs	7
Federal Sources	7
State Sources	9
Private Sources	9
ARCs Themselves	10
Budgeting	10
State Advisory Committee	10
Services Offered by the State Advocacy Office	11
Setting Up the Local Office	12
Study Committee	13
Feasibility Study	14
Obtaining Funds	15
Locating an Office Site	16
Other Initial Considerations	17
Insurance	17
Incorporation	17
Staffing	17
Local Advisory Committee	18
Sub-Committees	19
Special Models	19
The Rural Model	20
The Institutional Model	20
Operation of the Local Office	21
Recruitment	22
Locating Proteges	22
Recruiting Advocates	25
Publicity Strategies	25
Scope of the Citizen Advocacy Model	33
Follow-up in Recruitment	35
Screening	35
Advocate Qualifications	42
Notification	42
Training and Orientation	43
Workshops	43
Classification Prior to Assignment	45

Subject — Page Number

Matching 46
Initial Contact 47
Role of the Coordinator In Monitoring 47
Six Month's Report/Reasons and Methods for Termination 49
Further Reporting and Expansion 51
Evaluation 52

In Summation 53

Program Forms:

Example A (Protege Referral Form) 23
Example B (News Release) 26
Example C (Radio Spots) 28
Example D (Publicity Release Form) 31
Example E (Advocate Application Form) 36
Example F (Reference Form) 38
Example G (Screening Interview Form) 40
Example H (Advocate's Monthly Summary) 44
Example I (Coordinator's Monthly Report) 54

IMPLEMENTATION OF CITIZEN ADVOCACY THROUGH STATE AND LOCAL ARCs

Studying the concept of Citizen Advocacy by reading Book I of this series simply sets the stage for the action to come. With a solid knowledge of the basics of Citizen Advocacy, the interested ARC can begin to take steps to implement programs at the state and local levels. As pointed out in Book I, ARCs are the most logical vehicles for implementation of advocacy programs for retarded persons because of their dedication to the mentally retarded and their freedom from domination by educational, vocational and protective service systems. The timing for ARC involvement in Citizen Advocacy is particularly good during this period of their history because so many ARC units are in a transitional phase from delivery of services to obtaining services, and they have thus spun off many direct service delivery activities to other agencies. Even though this book is slanted for use by the ARC, other similar groups or organizations could easily use the material.

As this book indicates, a structured system of state and local Citizen Advocacy offices must be set up in order to most efficiently turn the Citizen Advocacy concept into a practical program which can be used by varied communities wishing to start advocacy activities. These offices are an essential part of the advocacy concept in supporting and reinforcing advocates in their roles and in making sure that programs and relationships continue.

The following are proposed guidelines for the establishment and operation of state and local Citizen Advocacy offices based on studies of the first such programs started in this country.

THE STATE OFFICE

Essential aspects in implementing state advocacy offices covered in this section are:

- **The Director of the State Program**
- **Funds for State Programs**
- **State Citizen Advocacy Advisory Committee**
- **Services Offered by the State Office**

Before discussing in detail the establishment of the state Citizen Advocacy Office, it is important to point out that while this office acts as a very valuable resource to local advocacy programs in the areas of planning, training, back-up and coordination, it is not always necessary to set up a state advocacy office first. For example, if only one or two local pilot programs are planned in a state, it is possible to start with these local offices and obtain further com-

mitments for other local programs before establishing a state advocacy office.

If a state advocacy office is to be established first by a state ARC, the ARC has two basic options. The unit can set up the state Citizen Advocacy office as a separate entity with its own quarters; or the state ARC can establish it under the ARC's own roof, drawing from their current staff and Board as initiators. The state ARC may wish to appoint a state advocacy committee to gradually begin the program in order to see what the reaction of local units will be and to obtain further commitments for programs before expanding the state office further.

It is best if the state advocacy office can, from the beginning, be staffed by a full-time salaried director, but a part-time director can start the program if necessary. Any other supportive staff can be drawn from persons already working in the state ARC office who are available and interested in Citizen Advocacy, gained through hiring new personnel, or secured by recruiting unpaid volunteers from within the general ranks of the ARC membership.

The Director of the State Program

The director of the state advocacy office should have experience and/or training in administration and public relations. Although not mandatory, it is also desirable that this person have a college degree in a field related to mental retardation (e.g., psychology, education or social work). It is also important that he or she have highly developed speaking and writing skills in order to effectively gain support from the public on a statewide basis, including government officials and leaders in business and industry. This person should also have demonstrated the talent for working with volunteers, youths, and adults from all socio-economic levels and a variety of ethnic groups. Finally, he should have the ability to organize and supervise others.

Here are some general suggestions relevant to performing the job of director of the state advocacy office:

- **It is helpful if the state director can work as, or with, a local coordinator for a short time to find out what problems and frustrations exist at that level.**
- **State directors should let the local coordinators be leaders in their own areas and not try to take over for them. However, they should be available to provide assistance when needed.**
- **The director should stress record-keeping in the state advocacy office and the local office by showing how it facilitates evaluation, reporting, and funding. The state office can pro-**

vide better back-up services if all of the locals are organized in a similar manner and if they keep clear, up-to-date records. Suggestions for file headings might include:

Advisory Committee	Newsletters
Advocate Activity Reports (monthly)	Potential Advocates
	Proteges Located
Community Resources	Requests for Program Information
Coordinator's Report (monthly)	Screened Advocates
Matched Relationships	Training Materials
Media/Publicity	Travel Vouchers
	Workshops

- **The state advocacy director should have initial training sessions for all local coordinators and plan a meeting at least quarterly with them to discuss problems, plans, publicity, etc.**
- **The director should keep informed about funding possibilities and pass this information on to the local offices.**
- **When the local offices reach 50-75 matched relationships, the director should try to help them locate additional back-up staff if at all possible. Most of the initial programs in the U. S. have found that 75 matched pairs are about the maximum number which can be monitored by one staff member.**

Funds for State Programs

The state Citizen Advocacy office should be established with long-range funding whenever possible in order to ensure continuation of the program effort. There are a number of possible sources for funds from federal and state governments and private sectors. Given below are some general suggestions for funding sources. Regulations and priorities for federal funding vary from state to state, or locale to locale so these guidelines should be used as a stepping stone to launch an investigation of specific possibilities for monies in specific states.

Federal Sources. Funds to initiate most of the first Citizen Advocacy programs were provided by the 1970 Developmental Disabilities Services and Facilities Construction ACT (DDSA), and the Social Security Act. DDSA funds for these advocacy offices were administered through regional or state DDSA offices. Social Security Titles IVA and XVI provided funds to be administered through state Social Security Offices. In most cases, these monies enabled establishment of programs, but have not proved to be long-term funding sources. Since that time, the Social Security Act has been amended (Public Law 92-603), and while Title IVA is still in effect, Title XVI has been subsumed under Title VI which has definite possibilities for advocacy funding through Social Security Offices. Regulations outlining these developments were printed in the

Federal Register, Vol. 38, No. 174, September 10, 1973. They may be obtained from Social and Rehabilitation Services of the Department of Health, Education, and Welfare (HEW), Washington, D.C., 20201, or by writing:

NARC's Governmental Affairs Office
Suite 808, 1522 K Street, N.W.
Washington, D.C. 20005.

Other HEW federal funds for advocacy efforts have been obtained from the Bureau of Education for the Handicapped, the National Institute of Mental Health, and the Rehabilitation Services Administration (the funding sources of NARC's Child Advocacy Project).

These regional offices of HEW can provide information on their current funding priorities.

Regional HEW Offices

Region	States	Address
I	Connecticut, Maine, New Hampshire, Massachusetts, Rhode Island, Vermont	**John F. Kennedy Federal Bldg. Government Center Boston, Massachusetts 02203**
II	New York, New Jersey, Puerto Rico, Virgin Islands	**Federal Building 26 Federal Plaza New York, New York 10007**
III	Delaware, Maryland, Pennsylvania, West Virginia, Virginia	**401 North Broad Philadelphia, Pennsylvania 19108**
IV	Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee	**Room 404 50 Seventh Street, N.E. Atlanta, Georgia 30323**
V	Illinois, Indiana, Ohio, Michigan, Minnesota, Wisconsin	**Room 712 New Post Office Bldg. 433 West Van Buren Chicago, Illinois 60607**
VI	Arkansas, Louisiana, New Mexico, Oklahoma, Texas	**1114 Commerce Street Dallas, Texas 75202**
VII	Iowa, Kansas, Missouri, Nebraska	**601 East 12th Street Kansas City, Missouri 64106**
VIII	Colorado, Montana, North Dakota, South Dakota, Wyoming, Utah	**9017 Federal Building 19th & Stout Streets Denver, Colorado 80202**
IX	Arizona, California, Hawaii, Nevada	**Federal Office Building 50 Fulton Street San Francisco, California 94102**
X	Alaska, Idaho, Oregon, Washington	**Arcade Plaza Building 1321 Second Avenue Seattle, Washington 98101**

Another probable source of funds falls within the boundaries of the five-year General Revenue Sharing Plan. Monies totaling $30.2 billion are to be distributed over a five-year period (retroactive to January 1, 1972), with one-third going to the states and two-thirds to general purpose units of local government. Funds can be spent for programs dealing with these general areas:

- Manpower
- Community Development
- Health
- Social Services

Mental retardation is included in the list of priority needs for these monies. However, Revenue Sharing funds cannot be used to match other monies in federally funded programs.

Federal legislation and priorities are constantly in flux, so it is difficult to generalize about future trends in funding possibilities. For detailed information on federal legislation affecting developmentally disabled persons, write to either NARC's Governmental Affairs Office or for **Federal Legislation Affecting the Mentally Retarded and Other Handicapped Persons,** an annual publication which may be obtained from:

National Association of Coordinators of State Programs for the Mentally Retarded, Inc.
2001 Jefferson Davis Highway, Suite 802
Arlington, Virginia 22202.

State Sources. In an effort to secure funds on a continuing basis, some state Citizen Advocacy programs have been established through funds from State Welfare Offices or State Offices of Mental Retardation. These state departments contract with the state ARC to administer the program in order to prevent direct control of the advocacy program by the state which could result in conflicts of interest.

Private Sources. A number of potential sources in the private sector have not yet been tapped for advocacy funds. These are private foundations, large industries, and service organizations. These groups make good prospects for funding because there is less chance of conflicts of interest. A good source for familiarizing yourself with foundations is:

The Foundation Directory ("Edition 4", Lewis and Bowers, The Foundation Center, Columbia University Press, New York, 1971).

Personal contacts with members of foundation staffs and their officers, business leaders in large industries, or officials in national and state service organizations are very important in effectively

presenting Citizen Advocacy programs to them for possible funding.

ARCs Themselves. Some states have found that sufficient funds for program operation can be garnered from state and local ARC units themselves who can include advocacy activities in planning their budgets.

Budgeting

The following budget headings are general considerations for planning and requesting funds for a state advocacy office:

Personnel Related

Coordinator's Salary
Secretary's Salary (or other supportive staff)
Fringe Benefits (including payroll taxes, FICA, etc.)

Office Related

Consumable supplies
Postage
Occupancy
Telephone
Furnishings and equipment

Program Related

Travel (_____¢ per mile)
Program materials (printing brochures, etc.)
Consultant Services

State Advisory Committee

When the state ARC is first considering establishing a Citizen Advocacy office, it should appoint its own Advisory Committee for direction, as a resource board in the program thrust, and in order to broaden the base of support for the project before it actually gets underway. Members of the Advisory Committee can also be called upon as persons with knowledge and expertise in specialized areas after the office is in operation. Approximately a dozen representatives from among the following groups should form the active body of the Committee. Others from the organizations listed could also be informed about advocacy and serve as consultants to the Committee and program if necessary. It is important to remember that too large a working committee can become unwieldy. Suggested membership for this Advisory Committee could be drawn from:

The state ARC Board of Directors

Representatives from local ARCs from various geographic areas around the state

Representatives of state offices of related organizations for the handicapped (United Cerebral Palsy Associations, Easter Seal Societies)

Clergymen from various denominations

State Employment Commission staff members

Welfare Department representatives

Educators

Members of groups like Jaycees or the League of Women Voters

Lawyers

Media and public relations experts

Law enforcement officials

Physicians, dentists, and others from allied health professions

Counselors

Representatives of minority groups and of handicapped persons themselves and their families

All of these persons should be informed and enthusiastic about the advocacy concept, and should be willing to put more than the use of their names into advancing the program.

It should be remembered that the functions of the Advisory Committee are not policy or decision-making (these areas are left to the state ARC officials and Board or the state ARC Advocacy Committee who first initiated the program); the Advisory Committee is established as a resource and consultative body to the project.

Services Offered by the State Advocacy Office

In its efforts to coordinate local Citizen Advocacy programs and to establish a statewide network of local offices, the services of the state advocacy office should include:

- Assisting in promotional campaigns in order to gain commitments to set up local advocacy programs. This includes providing material for the media, public speaking, etc.
- Helping local advocacy offices to conduct workshops for specific groups of community members interested in the advocacy concept.
- Helping the Local ARC Board set up a Study Committee to determine the feasibility of an advocacy office in their town, establish funding, secure an office site, and hire a suitable coordinator.
- Training local coordinators.
- Distributing and explaining advocacy guidelines and training materials provided by NARC to the local programs in the state, and giving back-up during all phases of their operation.

The state advocacy office **may** also wish to develop additional materials oriented to their local programs to supplement NARC's materials and spotlight their own advocacy activities.

- Providing necessary legal advice through State Advisory Committee members or other resources until the local offices can set up their own Advisory Committees.
- Devising means for self-evaluation of local programs, and setting up uniform methods for their operation.
- Conducting advocacy research and acting as a resource center.
- Coordinating activities of local offices and keeping them informed of each other's problems, solutions and special events through a state advocacy newsletter, and contributing news to NARC's national advocacy newsletter.
- Keeping NARC's Child Advocacy Project aware of current advocacy activities in the states through contact with NARC Regional Representatives and the National Project Staff.
- Being informed about pending legislation, legal actions, and funding possibilities that may be of interest to the state's local programs.
- Conducting frequent on-site visits to local offices to update programming and share ideas.
- Sending letters of welcome to new advocates and proteges accepted into the local programs in order to make them feel that they are a welcome part of the state-wide advocacy movement.

SETTING UP THE LOCAL OFFICE

Areas to be considered under this heading include:

Study Committee
- Feasibility Study
- Obtaining Funds
- Locating an Office Site

Other Initial Considerations
- Insurance
- Incorporation

Staffing

Local Advisory Committees
- Sub-Committees

Special Models
- The Rural Model
- The Institutional Model

Local ARCs interested in starting Citizen Advocacy offices on their own can do so even if there is currently no state advocacy

office to assist them. However, if they do have access to the facilities and services offered by such a state office, their task will be just that much easier, and they should, of course, contact an existing state advocacy office from the very outset. The first step in starting a local advocacy office is to locate a sponsor for the program. An interested citizen or ARC member can approach the local ARC Board and propose that their unit sponsor a Citizen Advocacy Program. If for some reason the local ARC cannot undertake this responsibility alone, consideration should be given to sharing sponsorship with other local organizations for developmentally disabled persons or service or civic groups or clubs. As previously noted when discussing the state advocacy office, the control of the program should be independent of local service delivery agencies.

In the earliest planning stages it is important to check in the community to determine if there is any other program currently operating in that city under the same advocacy name or concept, so that confusion and overlap between the two can be prevented, and cooperation can be established.

STUDY COMMITTEE

The Study Committee is an important working group which should be formed by the local ARC (or other sponsor) once a firm interest in setting up a local advocacy program has been established.

Possible members of the Study Committee to be selected by the local ARC Board, could include representatives of:

- **The local ARC leadership**
- **United Cerebral Palsy Associations**
- **Epilepsy Foundation of America**
- **Easter Seal Societies**
- **The legal profession**
- **Local businesses**
- **City Council**
- **Religious organizations**
- **Public relations firms**
- **Local newspapers**
- **Other media**
- **Law enforcement agencies**
- **Child Welfare Agencies**
- **Family Service Agencies**
- **Social work organizations**
- **Insurance experts**
- **Employment offices**
- **Public Health offices**
- **The medical and dental professions**
- **Local education programs**
- **Civic and service organizations**
- **Fraternal and social clubs**

The composition of this committee should not exceed more than 20 active members, and should also represent the various ethnic groups within the community as well as youth, families of handicapped persons, and the handicapped persons themselves. Some

of the members may want to study this advocacy approach as a prototype for setting up programs for other groups of disadvantaged or impaired persons as well.

The major functions of the Study Committee involve investigating the feasibility of starting a Citizen Advocacy program in a given community by:

- determining interest in the concept on the part of key persons in the community.
- checking out possible sources of funding and developing a proposal for requesting funds.
- selecting a possible office site.

If assistance is needed, members of this Committee can call on the state and local ARC Board and staff, or the state Citizen Advocacy office, if one has been set up.

Feasibility Study. Once the Study Committee has been formed, an effort should be made to contact key community officials and professionals and familiarize them with the concept of Citizen Advocacy. While this general information is being presented to these people on a person-to-person basis by members of the Study Committee, it can be informally determined by the Committee if civic leaders, personnel of local agencies which provide mental retardation services, and other interested citizen groups would welcome and support the proposed advocacy program. This is best accomplished through individual contacts. If, however, the number of people is too great, or if some are too distant, a personalized letter should be sent to elicit their cooperation and support.

It should be stressed at this point that this first effort is not to be considered a full-fledged publicity campaign, but is rather to be seen as an educational endeavor and a means of measuring initial reactions to the idea of advocacy services. The focus of this thrust is to form a broad base of support in the community by making contacts with the media, city officials, and professionals in fields allied to mental retardation. Involvement of these groups can greatly facilitate the implementation of the program and ensure its effectiveness. Caution should be taken to provide general information rather than trying to recruit proteges and advocates at this time before a program has been started. If advocates are recruited too far ahead of the time that they will actually be able to be matched to proteges, their enthusiasm will wane since a high degree of interest cannot be maintained over a prolonged period of time without some forthcoming action. This time lag can result in negative public reaction.

In determining the feasibility of the program, the Study Com-

mittee should also estimate the number of mentally retarded persons in the area who could potentially benefit from Citizen Advocacy. Not all mentally retarded persons necessarily need advocates. The estimate can be made by contacting local agencies who can provide facts and figures such as Child Welfare offices, residential facilities, mental retardation centers, or state offices concerned with local services for mentally retarded persons. Since many children may be receiving services from more than one agency, care should be taken to avoid overlap in estimating potential numbers of proteges.

Obtaining Funds. When it is determined that a community could effectively mount a Citizen Advocacy Program, some members of the Study Committee should be assigned the task of investigating possible sources of funds at the federal, state and local levels. As it was pointed out earlier in the section dealing with funding for state programs, federal funds should be considered only as an initial source of support. Much of the information under "Funds for State Programs" is also applicable to local funding. (See pp. 4-9). Agencies who are responsible for administering mental retardation services at the state level are potential sources of support since Citizen Advocacy can play a vital role in many states' efforts to reduce institutional populations and establish effective community-based services. It should be pointed out to these funding sources that advocates can form a vital link between the former institutional resident and the community. Just as it was a concern in setting up a state program, planners of the local program should make every effort to avoid conflicts of interest in selection of possible funding sources.

When requesting funds for operating a local Citizen Advocacy office, the potential funding agency should be contacted for instructions regarding the information to be provided in the request. Most proposals will require a detailed justification of the purpose (or need) for the program, its goals and objectives, projected numbers of people it will serve, how it will be conducted in order to achieve its goals, a detailed budget projection, and the plans for program evaluation and replication.

When developing a program budget, extensive research should be conducted in order to accurately estimate costs in all program areas. The budget headings listed under "Budgeting" (pg. 9) also are applicable to estimating local office budgets. Local programs will find it beneficial to obtain actual local estimates for similar salaried positions in other service programs, needed furnishings, equipment and supplies, and necessary travel. These estimates can be obtained by seeking information on supply usage from other similar-sized programs or businesses in the city, requesting figures for equipment and furnishings from retail stores, discussing needs

with public service or utility companies, and ascertaining rental costs for space required from a leasing agent. Other local advocacy offices already in operation, as well as the state advocacy office, are also good resources for sample budgets.

Locating an Office Site. As its next step, the Study Committee can begin to look for a potential site for the local Citizen Advocacy office, which should be situated in an area of the community that is accessible to both advocates and proteges. If there are group homes or apartments for mentally retarded persons in the community, the advocacy office should be as near to them as possible.

As mentioned earlier, the office should not be physically located in space provided by a service delivery agency due to problems which might arise when an advocate comes into conflict with the system if he feels his protege's best interests are not being served by that agency. However, the office could be located on the premises of the local ARC office, in a community volunteer center, or in a church. Some local programs have found businesses or clubs willing to donate the necessary office space.

At this point, the Study Commitee or other ARC members with appropriate contacts may want to begin locating office equipment. Cost of the following equipment should be figured into the budget, or perhaps local civic or social groups can be persuaded to donate part or all of the necessary items:

- standard office furniture and file cabinets
- a mimeograph machine or other copying device
- typewriters, and possibly dictating equipment
- other accessories such as a collator, bookcase, postal scale, pencil sharpener
- optional audio-visual equipment (this could be added later) — tape recorder, slide projector, screen, overhead projector. camera, etc.
- consumable supplies.

OTHER INITIAL CONSIDERATIONS

Insurance

Members of the Study Committee and ARC Board should consult with an attorney and insurance broker when preparing a budget proposal to determine if the local office wishes to provide insurance coverage for advocacy staff members and advocates themselves. In some cases, the ARC will find that it may already be carrying insurance which will automatically cover any program under its auspices. Some programs have found that a special group insurance plan can be worked out to protect persons in the program at a nominal cost, thus ensuring that an unforeseen accident or injury will not jeopardize the future of the advocacy endeavor.

Incorporation

If the Citizen Advocacy Office is to be set up as a separate entity, as mentioned earlier in this text, consideration should also be given to whether or not the office should be incorporated after funding has been secured. This procedure is desirable since it prevents individual liability (on the part of the coordinator, for instance), and makes any debts incurred in setting up the office or obtaining services the responsibility of the corporate body. A corporation is not dependent on individuals or identities for continuation, thus ensuring that the program will continue even if there is a change in personnel.

The steps in forming a corporation are simple and relatively inexpensive, but they do require an attorney's services. Such matters as this illustrate how valuable it can be to involve members of the legal profession in the program from its inception.

In the case of an ARC which is already incorporated, the advocacy office may be considered as a part of the incorporated ARC unit. On the other hand, the ARC may wish to incorporate its advocacy office separately, using the same procedures the ARC itself utilized to become incorporated.

STAFFING

Members of the Study Committee or members of the ARC Board of Directors should begin to make contacts in an effort to locate prospective applicants for the position of local coordinator prior to notification of funding in order to prevent unnecessary delay in staffing once the program has obtained needed financial support. After funding is definitely secured and formal staff recruitment begins, a full-time coordinator should be hired first with as many supporting personnel added as the budget and program will allow. Some of the supporting staff may be volunteer workers.

The qualifications for a local coordinator are very broadly defined, and a college degree is not necessarily required for this position, although a bachelor's in a field related to mental retardation is helpful. A mature outlook, an ability to get along with and supervise other people, and a talent for public speaking and related writing are sufficient. Someone with community contacts already established will also have an advantage.

This coordinator could be trained by the state advocacy office director or a member of his staff, or a coordinator from a Citizen Advocacy program already established in another town or state (in the event that there is no state Citizen Advocacy office in the new coordinator's home state). Included will be techniques and procedures for organization of the local advocacy office as well as instruction in record-keeping so that ongoing evaluation and upgrading of the program can be expedited. The coordinator should be cautioned against trying to do the advocate's job for him, and against turning into a caseworker, taking on too much of the load of the relationships himself. The coordinator's role is that of supporting and reinforcing the advocate in his activities with his protege while keeping an eye on both of them to make sure that their relationship is mutually beneficial. The coordinator must realize that just as over-protecting the protege is wrong on the part of the advocate, so is overprotecting the advocate wrong on the part of the coordinator.

After his training is completed, the coordinator is responsible for training his own staff. Included in their combined duties are screening and training advocates, matching them with proteges, and monitoring and reviewing the relationships; trying to reach all levels of the community in an effort to involve persons in the program who have never been included in volunteer efforts before; and handling any paperwork necessary for new funding to be requested and for the program to be evaluated. Keeping updated files on all phases of program operation as well as maintaining a master file of community contacts and resources are also part of the job.

LOCAL ADVISORY COMMITTEE

Once a local Citizen Advocacy office has been established, the Board of Directors of the ARC and the local coordinator (if one has been hired) should set up an Advisory Committee. As pointed out earlier, with respect to the state office, it is desirable to appoint some of the more active and interested members of the Study Committee to these positions. This Advisory Committee will make **recommendations** to the Board of Directors and the local coordinator regarding operation of the program and provide backup and

support for advocates. They are not a policy-making body, but are rather a consultative and resource group. If at all possible, the local coordinator should meet with the Committee on a monthly basis, especially in the program's beginning, in order to review the office's progress and problems. The Committee should also review and make recommendations on all long-range objectives and the methods to be used in achieving goals.

A variety of disciplines and professions should be represented by the membership of the Advisory Committee. Functions of this Committee include providing individual advocates with supplemental advice regarding legal, financial, and emotional risks, and to offer advice in specific cases which may arise. If possible, the membership should include one or more representatives of the media, community services groups; city government, health agencies; fraternal or social clubs; and minority, youth and consumer groups. (See previous listing for the state Advisory Committee and the local Study Committee.)

In some cases, professionals who served on the Study Committee may desire to continue helping without becoming members of the Advisory Committee. These professionals can serve the program on a "stand-by" basis by assisting only at times when their specific kind of expertise is needed.

Sub-Committees

The local office will find it helpful to assign members of the Advisory Committee to sub-committees. Suggested divisions might include: (a) **a Publicity Sub-Committee,** containing some members who are media professionals responsible for dissemination of materials, as well as minority representatives who can reach community groups who are sometimes left out in such publicity campaigns; (b) **a Legal Sub-Committee,** consisting of attorneys who can give counsel on legislation, court cases, incorporation, insurance coverage, legal rights of the retarded, etc.; (c) **a Youth Advocacy Sub-Committee** to deal with the establishment of a youth wing of the program and to help deal with issues and questions facing youth advocates; and (d) **a Relationship Review Sub-Committee** which would also work with the Advisory Committee and the coordinator in conducting the evaluations of advocate-protege relationships (see p. 49).

SPECIAL MODELS

In setting up local offices, state and local ARCs may wish to consider establishing both rural and institutional Citizen Advocacy programs. These models involve special considerations as discussed below.

The Rural Model

Most ARCs will want to develop both urban and rural models for advocacy. While most of the programs in operation around the country are based in urbanized areas where the sponsoring ARCs are located, it is also possible to set up advocacy programs in rural areas as well, even if there is no local ARC unit nearby.

First, those initiating the rural program should determine which areas would be the most favorable sites. Possibilities include several rural communities clustered close together, rural areas adjacent to a large metropolitan center, or a scattered rural population.

There are three main approaches to these rural advocacy systems. The first is for an advocacy office in a nearby large city to hire a staff member who will be responsible for advocacy services to satellite rural communities. He can travel from one small town to another, making sure matched relationships are proceeding smoothly. Under the second model, proteges can be matched with advocates in the communities who will help them commute to town for exposure to activities they might otherwise miss. Advocates could also visit the rural areas. It is also possible for a single rural community to set up its own local advocacy program.

The Institutional Model

Referrals to local Citizen Advocacy offices from institutions are a good source for locating retarded children needing advocates. It is interesting to note, however, that many institutions are endeavoring to set up their **own** advocacy programs, and it seems appropriate here to mention some of the problems of this type of "inside" arrangement. (Note: The following discussion does not necessarily apply to institutions which have formed their own "special interest" ARC units who operate the programs, rather than having the institution itself operating the advocacy office.)

Difficulties encountered by institutional advocacy programs are similar to those found in protective service agencies. When institutions sponsor their own programs, they often have trouble effectively representing the interests of the institutional system and the best interests of the retarded residents at the same time. Some institutional programs have had to make a decision between supporting advocates when they speak out for the rights and dignity of the residents, or protecting the institutional system by attempting to control advocates. Choosing the latter course has resulted in failure of the program, or in the final establishment of "another traditional volunteer program," lacking the effectiveness of a true advocacy effort, which vigorously defends the rights of the mentally retarded, no matter whose "toes get stepped on."

A good example of these kinds of difficulties was found in a Canadian residential facility for mentally retarded adolescents and

adults. Records kept by this facility during the time it was trying to operate the advocacy program indicated that problems arose when the advocate either directly challenged the professional staff concerning the protege, or the advocate was doing something to which a member of the professional staff objected. In addition, the administration of the advocacy program took hours away from the staff time needed to handle the normal workload of the institution. Due to these factors, the facility decided to turn the operation of the program over to a community group instead.

Some institutional programs which have experienced this conflict of interest have minimized problems by allowing an outside sponsor, such as a local ARC, to operate the advocacy program within the institution with the support of an Advisory Committee composed of interested community professionals, institutional representatives, and lay persons who act strictly as a consultative body. It is particularly important that an institutional program be set up in the right way from its initiation so that conflicts of interest, such as those mentioned above, will not weaken the program's thrust. For this reason, it generally seems best for a source outside the institution to operate the advocacy office and recruit proteges from within the institution. An ARC starting a local program should seek support from any residential facility in the area early in the office's operation. Efforts should be made to enlist the institutional staff's cooperation in referring proteges and working with advocates serving residents.

OPERATION OF THE LOCAL OFFICE

This section of Book II discusses the following operational considerations:

Recruitment
- Locating Proteges
- Recruiting Advocates
- Publicity Strategies
- Scope of the Citizen Advocacy Model
- Follow-up in Recruitment

Screening
- Advocate Qualifications
- Notification

Training and Orientation
- Workshops
- Classification Prior to Assignment

Matching
- Initial Contact

Role of the Coordinator in Monitoring

Six Months' Report/Reasons and Methods for Termination

Further Reporting and Expansion

Evaluation

RECRUITMENT

Locating Proteges

The staff should endeavor to locate mentally retarded persons needing services prior to recruiting advocates. This can be done through publicity campaigns via newspapers, radio and television spots, contacting residential facilities, schools, hospitals, etc., and public speaking to parent groups. In preparing news releases and selecting persons from the Publicity Sub-Committee of the Advisory Committee to serve on a Speaker's Bureau, the coordinator should remember to slant materials to fit the audience he wishes to reach. Highly technical terms regarding mental retardation, jargon used among certain groups of professionals, and "flowery" or "preachy" language are to be avoided when writing for or speaking to the general public. A simple, direct style of presentation will find a more receptive audience. However, if the audience is to be composed chiefly of professionals, the person sent to make the advocacy presentation should have sufficient expertise to answer questions and speak for the advocacy program.

Good possibilities for locating prospective proteges include protective service agencies, sheltered workshops, training centers, residential facilities, and the public school system. These and other community groups who work with handicapped children should be provided with referral forms by the Local Advocacy Office, and informational workshops should be held for representatives of these agencies early in the establishment of the program to familiarize them with the concept and make them aware of how to refer potential proteges to the local office. One possible format for referral forms for proteges is given here. (See Example A.)

EXAMPLE A

CONFIDENTIAL

For Use by Local Office Only

Advocate Assigned (Name):

Date:

CITIZEN ADVOCACY REFERRAL FORM FOR PROTEGE

Name: Phone:

Address: Date:

Birthplace: Sex: Ethnic Group: Religious Preference:

Circle degree of mental retardation: Mild, Moderate, Severe, Profound

List other handicaps or problems:

Family:	Name	Address	Phone
Father:			
Mother:			
Other: (state relationship)			

	Age	Sex	At Home?
Siblings:			

Where does protege currently reside and with whom?

If resident of an institution or other residential facility, give:

Name of facility: Date Admitted:

Primary person to be contacted at facility: _____

Is this person currently employed? _____ By whom? _____

_____ In what capacity? _____

Special needs, interests, hobbies, or skills of the mentally retarded person: _____

Why do you think this person needs a Citizen Advocate? _____

_____

Can you suggest appropriate areas in which the advocate could assist the protege? _____

_____

Have you mentioned Citizen Advocacy to the potential protege and to the protege's family? _____ Reactions? _____

_____

GENERAL COMMENTS: Briefly describe the protege in terms of ability to communicate or to relate to others and give any other information you feel is relevant: _____

_____

_____

REFERRAL SOURCE: Name: _____

Address: _____ Phone: _____

Agency: _____ Position: _____

* * * * * * * *

Please return this completed form to:

(Local Coordinator): _____ Phone: _____

Office Address: _____

Recruiting Advocates

At least a few proteges should have been located prior to beginning advocate recruitment in order to minimize waiting periods for new advocates and to make maximum use of the advocate's initial enthusiasm before it has a chance to cool down. The following publicity strategies are designed to generate public interest in the Citizen Advocacy Program, and require careful follow-up in order to be most effective in recruiting advocates.

Publicity Strategies

The local advocacy coordinator and staff, with the assistance of selected members of the ARC and the program's Advisory Committee, should launch a publicity campaign via as many media as possible in order to familiarize the public with the concept and its implementation. (Samples for a news release (Example B) and radio spots (Example C) are given in this section of the text to assist you in preparing your own materials.)

The recruitment campaign for advocates should follow the same guidelines as the effort to locate proteges in regard to use of informal language, but it should have a broader audience (e.g., civic groups, persons unacquainted with the field of mental retardation, and people who have never been involved with any kind of similar program before). Both advocates and additional proteges will be located through this campaign.

EXAMPLE B

(This news release is an example of how actual case histories can be worked into a story in order to catch the interest of the reader before giving him facts about the program itself. As discussed under "Publicity Strategies," written permission must be obtained from all persons named in publicity materials. Copy for the newspaper office should be typed double-spaced.)

SAMPLE LOCAL NEWS RELEASE

CONTACT:
(Name of coordinator) _____
(Address of Office) _____
(Phone number of office) _____

TO: (name of specific newspaper staff member who usually handles stories concerning mental retardation, education, volunteer programs, etc.)

RE: Citizen Advocacy Program in (your town)

RELEASE DATE: (If the story must be published by a certain issue to announce a specific event.)

Jimmy is nine years old and has never been to a grocery store, used a telephone, seen a toaster or a can opener, or known what it's like to have a real home. He was one of six children abandoned by their family at an early age; and although the other five were placed in foster homes, Jimmy was institutionalized because he was termed mildly mentally retarded.

Mrs. Anderson is a middle-aged housewife with teenaged children. She lives in a comfortable suburb where she is active in church and women's club activities. She has little knowledge of mental retardation, but she is very interested in becoming involved in working with a retarded person.

What could possibly bring these two people together?

The answer is Citizen Advocacy, a concept that involves matching a citizen volunteer ("adovate") and a mentally retarded person ("protege") in a one-to-one relationship.

Now (your town) is initiating its own local Citizen Advocacy program sponsored by the (your) Association for Retarded Citizens in order to bring people like Jimmy and Mrs. Anderson together. The new office is located at (address of office), and according to Local Citizen Advocacy Coordinator (name), the program is currently seeking both advocates and proteges. This program is part of a nework of Citizen Advocacy offices that are being set up all across the nation.

"A Citizen Advocate is a volunteer to a specific mentally retarded person. The advocate fills the needs of the protege and acts as a spokesman for his rights," (local coordinator) said. "Some of the needs may be emotional, and the advocate can meet them by providing friendship and new experiences for the protege. Other needs may be more practical, like helping a retarded person who has just left an institution make a successful adjustment to community living. There are also more formal advocacy roles such as guardianship or trusteeship," (he/she) added.

"A Citizen Advocate is involved in a one-to-one relationship, helping the retarded person live a fuller life in many ways," (local coordinator) continued. "When a person first expresses an interest in advocacy to us, we tke his application, interview him, give him more information about Citizen Advocacy and generally try to determine if he can contribute and benefit from the program. When he is accepted as an advocate, he must atend several training sessions in order to learn more about advocacy, mental retardation, and the advocate-protege relationship. Then he is matched with a mentally retarded protege. Throughout the relationship, the local advocacy office and I are always available to assist the advocate in whatever way we can," (he/she) concluded.

The advocacy program also has an Advisory Committee made up of interested professionals and laymen in (your town) who can be called upon for back-up for the office and the advocate and protege. Currently serving on the Advisory Committee are: (list members of the Advisory Committee in your town).

For more information about the local Citizen Advocacy Program, call (local coordinator) at (office phone number). There are many mentally retarded people like Jimmy in (your town) just waiting for a Citizen Advocate.

EXAMPLE C

(These are samples of radio spot announcements with approximate time lengths given. You should provide these to local radio stations which may give you free public service time. With appropriate visuals, these spots can also be used on television. The name of the program and of the contact person, as well as the address and phone number of the office, should appear on all media materials.)

RADIO SPOTS

15 seconds:

Daily living is a composite of many little things . . .things most of us take for granted. As a Citizen Advocate, you can help those important little things happen in the life of a mentally retarded person . . . making him more aware of the world, and making the world more aware of him. For information, call the (name of city) Citizen Advocacy Office, (phone number).

20 seconds:

Are you interested in human ecology? Are you tired of hearing everybody talk about the problems of handicapped people while nobody really does anything about them? If you want to get involved, consider Citizen Advocacy, a way to help mentally retarded people live fuller lives and enjoy the same rights the rest of us do. For information on how to become a Citizen Advocate, call (phone number). Reach out as a Citizen Advocate, and you'll find somebody reaching back.

30 seconds:

Your family . . . your friends . . . your job . . . your home . . . your hobbies . . . your life. Yes, you're pretty busy, aren't you? But are you too busy to help a mentally retarded person to live a fuller life? What? You say you don't know anything about retarded people, that you're not sure you would know how to help? That's where Citizen Advocacy comes in. As a part of your local Citizen Advocacy program,you can learn how to help these people enjoy all those important things in life that the rest of us take for granted. By forming a one-to-one relationship with a retarded person, you can enable him to take his place in this complex society of ours. You can make a world of difference. Call the (name of city) Citizen Advocacy Office, (phone number).

General recommendations concerning publicity strategies for building the program include:

DO —

- consider carefully the audience you wish to reach before preparing publicity materials and write or speak on the level they will best understand.
- make personal contacts with churches, social clubs, PTAs, civic groups, etc. through phone calls or personalized letters, and consistently follow up on these calls, keeping a record in your files to indicate when the contact was made, how it was followed up, and the results obtained.
- hit each publicity area more than once. Perhaps you will want to designate a specific vehicle for dissemination each month. For example, you may want to concentrate on newspapers in May, radio in June, TV in July, shopping center displays in August, and school fairs or church bazaars in September.
- make initial contacts with media persons yourself; don't wait for them to come to you. Find out which newspaper reporter normally handles stories concerning mental retardation or related fields, or which staffer is in charge of making story assignments, and give the information to him personally each time you go into the newspaper office. This ensures that the story won't be shuffled from desk to desk until it reaches the right person. If a time element is involved in your story, be sure and indicate a deadline for running it at the top of the first page so that it won't be published too late to fulfill its purpose.
- find out and observe media deadlines. For example, if the deadline for getting a story into Thursday's paper is Wednesday at noon, don't bring your story in at 4 p.m. and expect to get it in. Be sure to find out deadlines for the various sections of the Sunday paper; Sunday feature and women's pages are especially good areas to publicize advocacy to a large readership. Prepare and release your materials and send letters out to publicize events well ahead of time, giving your readers plenty of time for planning and response.
- consider writing a "Letter to the Editor" or having a prominent member of the Advisory Committee, a parent of a protege, or an advocate write such letters. This is an excellent way to bring advocacy to the attention of both the public and the newspaper personnel. You may want to assist people in your program in phrasing such letters.
- have your materials well organized before presenting them to media people. Don't go into an office unprepared and say, "I have a great idea for a feature story—maybe you can figure something out." It's your job to present your material in such a way that it can easily be adapted to newspaper, radio, or television style.

DO's, Cont. —

- remember it is possible to create news. Examples: have a get together for advocates and proteges and give special awards, or invite a prominent local official to cut the ribbon for the opening of the advocacy office. Helpful hint: although some newspapers still publish pictures and stories on proclamation signings, the majority of them seem to be shying away from the traditional pose of a mayor signing a proclamation naming "Local Citizen Advocacy Week" as interested parties look over his shoulder. This kind of photograph is too common — try and come up with a more human-interest oriented picture idea to publicize events like Citizen Advocacy Week. A possibility might be to show an advocate and protege engaged in an activity with the local coordinator.

- try to include groups of persons not usually reached by service programs as you recruit advocates and proteges. For example, find out what publications minority group persons read most frequently, and obtain coverage in them with a well-planned strategy to present your materials in an appropriate fashion for this audience. Don't slant your materials too much toward a female audience; try to attract males to the program, too.

- make an effort to obtain community service time on TV and radio and to do guest spots on local talk shows. Familiarize yourself with your local station's programming. Do they do newsreel-type broadcasts, documentaries on local subjects, taped or live talk shows, public service announcements? Find out how far in advance schedules run by contacting the station's program director, and go to him to discuss your idea. Don't worry about whether or not you understand the technical terminology used by these professionals; it's your idea that's important.

- organize community information workshops utilizing audio-visual materials and advocate-protege panels (after the program is sufficiently under way) to present advocacy to the public in concrete terms.

- gather photos or artwork done by, or depicting, advocates and proteges and set up information booths at school fairs, church bazaars, and shopping malls where people can stop, take a look, and ask questions of you or whoever is assigned to the booth, and pick up fliers or brochures concerning the program.

- BE SURE all news releases, brochures or other publicity materials contain the address and phone number of the office (or the name and number of a contact if the office has not yet officially opened) so that interested parties can request further information.

DO's, Cont. —

- **BE SURE to get proper release forms on all persons who are subjects of news-stories, photos, and other publicity devices so that your office will be covered. An example of a release form is given in this section of the book. (See Example D.)**

EXAMPLE D

CITIZEN ADVOCACY PROGRAM PUBLICITY RELEASE FORM

Program:

Address of Office:

Name of Coordinator:

Phone Number:

Name of Advocate:

Name of Protege:

Consent

Consent is hereby given to have photographs taken of (name of subject) and used by the _____ Citizen Advocacy Program. I authorize the use of such photographs with, or without, news releases or other forms of publicity. I hereby release the _____ _____ Citizen Advocacy Program from all claims and demands that I might have by reason of the use of said pictures and publicity.

_____
Signature of Above Named Subject. Parent or guardian must sign if subject is a protege.

_____
Signature of witness

_____
Date

DO's, Cont. —

- request sample copies (tearsheets) of publicity received and keep a project publicity file folder or scrapbook. Many funding sources want to see what dissemination activities the office has been engaged in, and these copies are good examples of possible formats for future coverage.
- familiarize yourself with all of NARC's printed and audio-visual training materials on Citizen Advocacy and use them in your initial efforts to reach the public. After your office is well-established, you may want to consider doing your own slide presentation, brochures, and other hand-out materials to show your project in its best light.

THINK BIG! YOU CAN DO MORE WITH PUBLICITY THAN YOU MAY THINK YOU CAN. KEEP TRYING.

DON'T —

- be discouraged if you don't succeed all at once.
- expect media people to come to you requesting information —although some will after the first thrust of your campaign, most do not have time to go out looking for feature stories. You will get better coverage by feeding them a steady stream of information over a long period of time. Be consistent in your publicity efforts—don't let them die down—and you will receive more follow-up.
- give the story to a particular newspaper staffer simply because he's a "friend of yours;" find out whose "beat" your story falls under and give the information to that person.
- walk in and demand coverage. You will get better results by asking for publicity and presenting a logical reason why you should have it.
- forget to utilize high school and college newspapers, PTA newsletters, church bulletins, and area professional publications.
- continue to fall back on stereotyped images of retarded persons (e.g., child-like or non-productive) in preparing your publicity materials. Try for a newer, more valid image, and take the time to let the reporter and photographer know what retardation is REALLY all about.
- be afraid to ask radio and television stations for free plugs. Most stations must do a certain amount of free public service announcements each year in order to renew their licenses, and they are eager for such material. They are not just "doing you a favor."
- call a "press conference" unless you have some very significant news to release (example: a case of legal advocacy that could set a precedent for other such cases).

DON'Ts, Cont. —

- **stress the long-term relationship too heavily in the early stages of recruitment of advocates. In all early publicity, the coordinator should mainly promote the less formal arrangements found in advocacy. He can still include the others without over-emphasizing them, pointing out that a short-term relationship can grow into something more.**
- **forget that "word-of-mouth" from people in the program is one of the best means to expand your advocacy program!**

Throughout the recruitment campaign for advocates, the coordinator should stress that citizen advocacy positions are unpaid and volunteer. Should your office decide to establish an "Emergency and Reimbursement Fund" in order to handle **unusual expenses** on the part of the advocate or protege or to enable persons not possessing adequate funds to serve as advocates, there are several possible options for obtaining these monies: pledges or donations by local social or civic groups; proceeds from benefits or fund-raising events held by the advocates themselves; small sums initially written into a grant; or monies earned by advocates or proteges by their working in the advocacy office for a set amount of time.

It is also important that efforts be made to recruit advocates for both emotional and practical roles. The more formal relationships (e.g., guardianship) should not be neglected in favor of the "Advocate-Companion" role. If the office establishes only friend relationships, it will be serving as nothing more than the usual clearinghouse for volunteers. On the other hand, if only formal relationships such as guardianships or trusteeships are established, the office becomes too similar to those protective service agencies discussed in Book I. The greatest strengths of the advocacy concept are its broad scope and flexibility, and if a lopsided program is set up, the office will lose its effectiveness as a true advocacy system.

Scope of the Citizen Advocacy Model

It is also of special importance to work toward total inclusion of a variety of ethnic groups, cultures, ages, and both sexes as advocates and proteges in the program. Too often, members of some ethnic or socio-economic groups are left out of service programs simply because they are not informed of them through appropriate publicity channels, or they are turned off to the program by what little information they do receive because of improper slant in the material. In many volunteer programs, white middle-class females are the persons most likely to become involved in devoting their time to "causes" because such programs are usually geared to attract them. The coordinator must work to counteract these problems by promoting a multi-cultural image for the program. One of the advantages of recruiting advocates from various ethnic groups

is that their having a similar cultural background to that of their proteges may make the adjustment to the relationship easier on both sides. New dimensions are also taken on by the programs that endeavor to include youths and senior citizens as advocates as well as to increase the percentage of men participating in the advocacy effort.

While minority group proteges may be fairly easy to locate through referral agencies, minority advocates may be more difficult to enlist. The coordinator could encounter:

- **a built-in resistance to outside "interference" from "do-gooders" whose attitudes and lack of knowledge of the living conditions and cultural background of the proteges may do more harm than good.**
- **problems in knowing how to slant materials to reach minorities when preparing recruitment and training materials.**
- **money problems where a young girl from a minority family, for example, might like to be an advocate, but does not have the financial means to participate in activities with her protege or to provide transportation, etc.**

The coordinator can attempt to offset these difficulties by:

- promoting a realistic down-to-earth image for the Citizen Advocacy program in the community by taking time to get to know the culture, life-styles and value systems of ethnic groups he plans to reach.
- consulting a public relations firm which handles minority clients and can make suggestions as to what publications are most widely read, what publicity strategies would work best, and what style of language and format for materials would be most suitable for reaching various ethnic groups.
- providing as much newspaper and free distribution publicity (leaflets, etc.) as possible, and making Citizen Advocacy known to community organizations specifically oriented toward ethnic groups.
- attempting to devise strategies to offset financial problems. Examples: setting up an "Emergency and Reimbursement Fund," as mentioned earlier, or finding busy persons in good financial positions who would like to sponsor minority advocate-protege relationships by providing funds for their activities instead of donating their own time which may not be as readily available.

In following these and similar strategies, the coordinator can ensure that the advocacy office is not perpetuating systematic discrimination against any groups who could benefit from the program.

Follow-up In Recruitment

Immediate follow-up should be made to interested persons responding to these publicity strategies in order to make the maximum use of the volunteer's initial enthusiasm. After a person has expressed an interest in advocacy, he should be asked to make a commitment through formal application, and the coordinator should request personal references and give the applicant informational materials to further familiarize him with the advocacy concept and roles. Samples of advocate application and reference forms are given here. (See Examples E and F.) If immediate follow-up is carried through, the prospective advocate will probably tell his family and friends about the program, and the office will benefit from the "snowball" or "cluster effect" when several persons become involved in the program at the same time. Beware of letting an advocate lose momentum due to too long a lapse of time between the initial contact and follow-through. A brief, personal interview between the coordinator and the interested party can prove beneficial to both at this time. During such an interview, the prospective advocate can ask any questions he may have, and the coordinator can seek to ascertain the reasons why the volunteer is interested in Citizen Advocacy.

SCREENING

Now, the coordinator and his staff can begin the official screening process. A screening interview takes place with a structured interview sheet for the coordinator to fill out as the meeting progresses. (See Form G.) It is important that the interviewer approach the volunteer with the proper attitude — the volunteer should not be made to feel that he is "on trial." While the coordinator should make it clear to the prospective advocate how important it is that thorough screening take place in order to make the best possible match between advocate and protege, it is also up to him to make sure that the volunteer feels comfortable and welcome. The screening process should not make the advocate feel uneasy, and he should be given plenty of time to decide if he wants to be a part of the program. Screening should give him a new respect for the seriousness of the role he is about to undertake while strengthening his commitment to serve.

EXAMPLE E

(Name of local coordinator
Address of local office
Phone number go here)

Date of application:_____ Date matched:_____

Protege:_____

APPLICATION FOR CITIZEN ADVOCACY

1. Name:_____ Birthdate:_____

2. Address:_____ Sex:_____

   Home Phone:_____ Business Phone:_____

3. Religious Preference:_____ Ethnic Group:_____

4. Marital Status: Single_____ Married_____ Separated_____

   Divorced_____ Widowed_____

5. Children, and their ages:

Name	Birthdate
_____	_____
_____	_____
_____	_____

   Are the other members of your family aware of the problems and willing for you to be involved?_____

6. Education:

   Major:_____

   Highest grade completed:_____ Degree:_____ Minor:_____

7. Present occupation:_____ Employed by:_____

   How long?_____ Best time to contact you:_____

8. Spouse's name and occupation:_____

   Spouse's place of employment:_____

   Phone number: Business:_____ Extension:_____

9. List your special skills and interests:_____

_____

_____

10. How long do you expect to remain in this area?_____

11. How did you first hear about Citizen Advocacy?_____

_____

12. Please list any previous volunteer work you have done, especially with handicapped persons:_____

_____

13. List any clubs or organizations you are currently affiliated with:

_____

14. What are your preferences regarding the age and sex of a protege?

Age group of protege_____

Sex of protege_____

15. Would you prefer to work with:

_____ a mildly retarded person

_____ a moderately retarded person

_____ a severely retarded person

_____ a profoundly retarded person

16. Would you object to being an advocate to a person with multiple handicaps? ____ Yes ____ No

17. What level of advocacy involvement are you most interested in?

_____ Advocate-Companion

_____ Advocate-Adviser

_____ Youth Advocate

_____ Associate Advocate
(professional who serves on the Office's Advisory Committee, etc.)

_____ Conservator, Guardian, Trustee

_____ Stand-by Advocate

EXAMPLE F

(This form is to be sent to three personal references listed on the application form completed by the prospective advocate. The local coordinator may also wish to send additional information on Citizen Advocacy to the reference so that he can better understand the program in relation to the applicant.)

CITIZEN ADVOCACY PROGRAM REFERENCE FORM

To: (Name of person given as reference)

Your name has been given to us by (advocacy applicant), who has made application to become a Citizen Advocate. Basically, a Citizen Advocate is a volunteer who works with a mentally retarded person ("protege") on a one-to-one basis. To help ensure that each advocate is a stable, capable individual and will be matched to the right mentally retarded person, we need the following information from you. Your answers will become a part of the advocate's confidential file and will be available only to the Citizen Advocacy Office. Your assistance is greatly appreciated.

Length of time you have known applicant: _____

Your relationship to the applicant: (relative, co-worker, employer, etc.) _____

1. Please circle the most appropriate word or phrase:

   a. The applicant is: unreliable, usually reliable, very reliable.

   b. The applicant's attitude is generally: apathetic, interested, enthusiastic.

   c. Emotionally, the applicant is: easily excitable, usually stable, very stable.

   d. Where others are concerned, the applicant is: indifferent, concerned, deeply concerned.

2. Please respond "yes" or "no" to the following items:
   Is the applicant:

   a. Patient? _____

   b. Able to tolerate frustration? _____

   c. Able to accept advice? _____

   d. Able to relate to: children? _____ adults? _____

3. In your opinion, does the applicant have specific limitations or problems in his past history that might affect his successful fulfillment of the advocate role?

_____

_____

_____

_____

4. Did the applicant inform you that he was listing you as a reference? _____ _____

5. Other comments about the applicant: _____

_____

_____

Date: _____

_____
Signature of Reference

_____
Street

_____
City State

_____
Phone

EXAMPLE G

(This form is to be filled out by the coordinator during, or following, the screening interview of the prospective advocate. This sheet supplements the advocate's application form.)

STRUCTURED SCREENING INTERVIEW FORM

1. Questions for prospective advocate:

A. What are your reasons for wanting to become a Citizen Advocate?

_____

_____

_____

B. When you hear the words "mental retardation", what comes to your mind?_____

C. Do you feel that society today accepts mentally retarded persons as fellow citizens?_____

_____

D. Do you feel that society at times fails to recognize the needs of individuals who are in some way "different"?_____

_____

E. Do you personally feel uncomfortable with persons who are physically handicapped (blind, epileptic, deaf, etc.)?

_____

F. What degree of frustration do you feel when you think someone isn't listening to what you are saying, or when someone isn't taking you seriously?_____

G. What kind of experience have you had in the past with volunteer programs?_____

H. How much time per week do you expect to be able to spend with your protege?_____ On weekdays?_____

Evenings?_____ Weekends?_____

I. How long do you expect to stay in the program?

Six months?_____ One Year?_____ Longer?_____

J. Are you willing to attend training sessions? _____

_____

2. Other comments: _____

_____

_____

_____

_____

Three personal references given by the prospective advocate:

Names	Addresses
_____	_____
_____	_____
_____	_____

Advocate Qualifications

The following advocate characteristics should be looked for by the interviewer during the screening process, which may require more than one meeting if the coordinator has any doubts about the applicant's qualifications for advocacy.

- a stable position in the community is necessary so that a consistent, lasting relationship can be ensured as much as possible. If it is known that an advocate may possibly be moving away in the near future, he should not be assigned to a protege, even though he may meet all the other qualifications. He can be placed on the Standby Advocate list to serve on a short-term emergency basis until his continuance in the community is assured.
- the prospective advocate's lifestyle should fall within the general realm of social acceptability, and he should have no indications of any difficulties in his past history which might cause him to be less than a good influence on his protege. This statement is deliberately made general because it will be mainly up to the discretion of the coordinator, his staff, and any members of the Advisory Commitee who might be called upon to determine this facet of the qualifications. It is stressed that the coordinator not set himself up as a moral magistrate who sits in stern judgment on prospective advocates. He must recognize that all of his advocates will be very human individuals, and that each case will be different. However, the coordinator must always put the interests of the protege first.
- the prospective advocate should demonstrate maturity and competency in his relationships with other persons and in his problem-solving ability. He should be able to have patience and empathy with the needs of his protege.
- the advocate should also display a willingness to learn about mental retardation and to approach with an open mind any stereotypes or misconceptions he may have about retarded persons.

Notification

After the advocate has been screened and references have been obtained and reviewed, he should be notified by letter or personal contact as to whether or not he has been accepted to be matched with a protege. If he is accepted, he should be made to feel that this is an important achievement and that he is being welcomed into the program, and he should be given additional informational materials. If he is rejected, the coordinator should give specific reasons for this decision (e.g., "You don't really have enough free time in your schedule," or "Since you are planning to move to another community in the near future . . . "). The state Citizen Advocacy office should be provided with names and addresses of those who are accepted into the local program so that the State Office can also write letters of congratulations to new advocates.

TRAINING AND ORIENTATION

Workshops

The next phase is that of training for the new advocate. It is recommended that each new volunteer attend **at least** three formal training sessions with the coordinator. Advocates can attend these workshops, possibly in the evening, in groups and should be given the following information:

- **printed matter on advocacy,** including an in-depth overview of four booklets on Citizen Advocacy.
- **other information** via slide presentations, films, or panel discussions involving actual advocates and proteges.
- **some idea of what to expect** from the retarded protege and of what is expected of the advocate. (Individual counseling will, of course, be held with each advocate after he has been matched with a protege in order that he can be familiarized with his protege's case history and meet the parents and professionals concerned with the child.)
- **awareness of resources** open to him through the advocacy office, Advisory Committee, and legal counselors.
- **discussion of specific topics** concerned with mental retardation (e.g., "Introduction to Mental Retardation," "History of Treatment for the Mentally Retarded," "Critical Incidents in the Advocate-Protege Relationship and How to Handle Them," "Human Dignity, Normalization, and Risk With the Retarded," and "Limitations of Advocacy Roles." Most of this material is covered in NARC's four-book series or in additional resource materials available frm NARC.).

During this training, it should be emphasized to the advocate that one of the main ideas behind the concept of advocacy is to provide retarded children with a voice to speak out for their needs and welfare without the hindrances often encountered by those who deliver protective services through agencies. Therefore, the advocacy office must endeavor not to professionalize the new advocate or make him into a "junior caseworker" with too much paperwork or red tape to get in his way. However, he should be trained to keep some record of activities and incidents in the relationship which he feels are significant, especially during the first six months of the match, so that an evaluation of the effectiveness of the relationship can be made at the end of that time, and so that information can be compiled concerning over-all services of

EXAMPLE H

Name of Citizen Advocacy Program

Address

Phone number

Name of coordinator

CITIZEN ADVOCATE'S MONTHLY ACTIVITY SUMMARY

Month: _____ ADVOCATE: _____

PROTEGE: _____

Please briefly summarize your activities with your protege this month.

DATE	ACTIVITY	COMMENTS

1. Briefly discuss any specific area(s) in which you have assisted your protege. Include discriptions of any problems or successes you have encountered this month that you feel are significant in your relationship.

2. Are there any areas in which the Citizen Advocacy office can assist you or your protege?

3. What activities have you and your protege planned for the near future?

4. Approximately how many hours have you spent with your protege during this reporting period?

5. Other comments:

six months are also needed to assess the long-range effectiveness of individual relationships and the program as a whole. A sample Advocate Activity Report form is given here. (See Example H.)

Classification Prior to Assignment

At the end of the initial training series, the coordinator should determine if further training or more individual counseling is necessary before the new advocate is matched with a protege. If not, the advocate is then ready to be assigned on the basis of his qualifications, attitude, and the amount of time he has to spend in the program. He may be classified as a regular advocate to be matched on a one-to-one basis with a retarded child, ideally spending some time each week with his protege; or he may be designated as one of two or more advocates to be assigned to the same protege. The following are examples of how this latter arrangement can work successfully: 1) one advocate does not have much free time, 2) an advocate is interested in looking after only the practical needs of the protege while another advocate attends to the child's emotional wants, or 3) a college student is leaving town for the summer and needs a second advocate to fill in for him until he returns in the fall.

In the case of advocates who are inexperienced concerning men-

tal retardation, the coordinator may find that it is a good idea to assign the novice as an intern advocate who works with a protege along with an experienced advocate who has already been in the program for some time.

The new volunteer may be placed on the list of Stand-by Advocates as mentioned above. He will then be on call to serve in crisis situations. This works well with persons whose time is limited due to job pressures or other time-consuming life situations.

MATCHING

The final matching of an advocate to a protege is based on the needs and interests of both. It is helpful if they have some activity in common, such as a sport or hobby. Through the screening process, the coordinator should become aware of his advocates' strengths and weaknesses and should be able to match them to proteges who can benefit most from the one-to-one relationship. It is sometimes helpful, especially in the case of teenaged advocates, for the advocate and protege to live in the same neighborhood or at least geographically close to each other in order to minimize transportation difficulties.

It has been suggested that if an advocate cannot spend a certain amount of time each week with a protege, or if he can't make a six-month commitment to the program, he shouldn't be matched in a regular advocate-protege relationship. However, in matching, it's more important to think in terms of needs of the protege and realistic goals the advocate can set for meeting these needs. While a sustained relationship is most desirable, its quality is more important than the sheer amount of time involved.

A meeting should be arranged between the advocate, parents of the protege, any professionals concerned with the case who might be able to give helpful information, and the coordinator. This meeting will prepare the advocate so that he can function more effectively in his relationship with the protege. Examples of information about the protege which would be helpful to the advocate include:

- **degree of self-help skills**
- **special medical or physical problems**
- **medication taken**
- **name and location of family physician**
- **family contacts to be made in case of emergency**

Caution should be taken to prevent biasing the potential advocate by relating opinions or impressions which may cause negative expectations on his part. For example, if the advocate enters into a relationship with the information that the protege "is aggressive," "can't learn to talk," or "refuses to cooperate," the advocate may

expect these problems to develop and inadvertently handle the protege in such a way that the results will reinforce the negative predictions and initial impressions given to the advocate. Another danger is that too much information may predetermine an unrealistic ceiling on the protege's developmental potentials for the advocate, thus restricting the relationship from the very beginning.

Initial Contact

When the volunteer is ready to meet his protege, the initial encounter will be easier for both if some simple activity, such as a visit in the protege's home, a walk in the park, or going to get a hamburger, is planned, rather than a more complicated form of entertainment. The two should get acquainted under as little strain as possible, and the protege's parents may want to remain nearby at first. In some cases, the coordinator may feel that it would be wise for the new advocate to join a more experienced advocate in meeting with the protege the first two or three times. The purpose of having a more experienced person on hand is not so that he can take over the situation entirely, or so that he can judge or criticize the beginning advocate—he is simply there as a helper, to make the volunteer feel more at ease. Many fledgling advocates will be nervous about relating to a mentally retarded child, or even a little afraid of the protege's behavior patterns themselves. The new advocate-protege relationship will take time to get off the ground just as any relationship does. During the initial meetings, the advocate should try to find out all he can about the needs, likes and dislikes of his protege, and they should plan suitable activities for the future. It is important that the advocate be cautioned by the coordinator not to promise activities that he cannot deliver, and not to start out at too rapid a pace which he will not be able to maintain.

ROLE OF THE COORDINATOR IN MONITORING

The role of the coordinator may lessen in visibility after the match has been made, but it does not lessen in importance. The coordinator plays a vital part in the supervision and support of the advocate-protege relationship, especially in its first six months. The amount of supervision time he will spend will vary from relationship to relationship, but it is important that every advocate have structured contacts with the advocacy office, particularly during the first months he serves and continuing thereafter as well.

The coordinator should plan group meetings for his advocates so that they can get together at least once a month in order to share experiences, problems, and questions. These informal sessions could take place at the office or in the coordinator's or advocates' homes. They should be planned for both new advocates and

those involved in ongoing relationships so that the novice can benefit from the knowledge of experienced advocates who can in turn share in the novice's initial enthusiasm. The coordinator should have minutes taken of the meetings or tape record the comments for later reference.

As mentioned earlier, each advocate should be encouraged and trained to keep record sheets of his comments on the activities he participates in with his protege. In most cases, it is ideal if the advocate can spend a little time with his protege at least once a week, and he should make a notation in his record book that often. The protege and/or his family may also be encouraged to report to the office, especially during the early stages of the relationship.

There is some difference of opinion among coordinators of the first Citizen Advocacy programs in the country concerning how structured advocate reporting should be. Some have devised forms to be filled out regularly and returned to the office by the advocate. (Refer again to Example H.) Others feel that advocates do not want to do paperwork, and that the local coordinator should handle making contacts on an informal basis by telephone or letter. This, however, is extremely time-consuming for the coordinator and does not provide as thorough a means of documentation of the relationships as advocate report forms do.

Several creative reporting and follow-up methods are possible.

- A simple form with date of activity, significant happenings, and the advocate's comments can be devised. (A similar format could also be used for reporting by the protege's family, and could be viewed as either optional or mandatory.)
- Advocates (especially Youth Advocates) can be encouraged to keep scrapbooks of the relationship which could later be displayed or even judged in a contest to give an extra incentive to the advocates and proteges.
- The coordinator can send out reminders on postcards, asking for a quick summary of recent activities or problems.
- The local office's monthly advocacy newsletter can remind advocates to report in, and their comments or questions could be shared in later issues of the newsletter.

In the early stages of the advocates' training, the coordinator should stress the importance of reporting in terms of helping the program expand and improve by benefiting from its mistakes and documenting and evaluating its growth. It should also be pointed out that many funding sources require such documentation for further funding.

The coordinator should also emphasize that the advocate may feel free to contact the office for aid or advice at any time. While the advocate should not abuse this offer, he should definitely take advantage of the services available through the office during crisis points in the relationship, or when he has a major doubt or question. The wise coordinator will make full usage of his Advisory Committee, legal counselors, Associate Advocates, etc., rather than try to carry the whole load himself. The coordinator should also remember that while he can make known to the advocate several alternatives available to him in any given situation, he should not make the decisions **for** the advocate. It is important to remember that the independent one-to-one relationship is the basis of the advocacy concept.

Six Months' Report/Reasons and Methods for Termination

At the end of the first six months of the match, a Six-Months' Report should be compiled by the coordinator and his staff based on reports turned in during that time by the advocate; contacts with the advocate, the protege, and the protege's family; and the observations of the coordinator. This report will be evaluated by the Relationship Review Sub-Committee of the Advisory Committee. (See page 19.) If this Sub-Committee finds that for some serious reason, the relationship is not beneficial to the protege, the advocate, or both, it can recommend remedial action in the form of counseling. Reasons for considering termination of the relationship might include:

- **the advocate does not have sufficient time to spend with the protege.**
- **the advocate did not follow through with the relationship and let it drop after the initial visits.**
- **the advocate has proven in some way to be a bad influence on the protege.**
- **the advocate himself feels that he cannot maintain the relationship in a beneficial manner to the protege.**
- **the relationship is having a detrimental effect emotionally on either the protege, the advocate, or both.**
- **the protege does not feel that he has been matched with a suitable advocate.**

In this evaluation of the relationship, the first consideration should be how well the advocate identifies with the needs of the protege and how well he fulfills them. He should not be evaluated on the basis of how earnest he is or how obnoxious he has been while trying to obtain services for and safeguard the rights of his

protege. One of the most important points in the advocacy schema is this ability of the advocate to obtain needed services for his protege and to help effect changes in the service system. However, of first importance is how beneficial the overall relationship is in meeting the protege's needs.

If attempts at remediation fail, then recommendation for termination of the relationship may be made by the Relationship Review Sub-Committee to the advocacy office staff, **and the coordinator should follow through on the action.** NOTE: Such termination could also occur prior to the six-months' date in **exceptional** cases. For example, if the protege's family reports that the advocate is not keeping appointments with the protege or is somehow causing anxiety in the home, the coordinator can thoroughly investigate and then terminate the relationship.

Although no cases of this nature have been reported thus far, the following question has been raised by a parent: "What if the coordinator, the committee, and I feel that the relationship should be terminated, but the advocate does not agree and keeps trying to see the protege?" In such an extreme case, the parent has the right to utilize legal avenues to terminate the relationship.

In addition to the action of the Relationship Review Sub-Committee, there are other reasons which may cause the dissolution of an advocate-protege relationship. Examples of such situations are:

- **the advocate or protege is moving to another city.**
- **the protege has reached a level of independence where he no longer needs an advocate as such, and the advocate's energies might better be spent in working with a new protege.**
- **the advocate himself or the protege and his family decide that an inaccurate match was made initially.**

When such situations arise, there are several important steps to remember in order that the separation may be accomplished with as little pain as possible. Too often mentally retarded children make friends who, for some reason, let them down or leave them uncertain regarding what to expect in the future of the relationship. All of us must face the loss of friends in life, and it is part of the process of normalization to expose retarded children to all the experiences that normal children go through. However, the easier the separation is made between protege and advocate, for example, the better the chances are that a new advocate can be introduced into the situation successfully so that the protege can remain a part of the program even after his advocate moves away.

The first point to remember is that the protege should be prepared well in advance (six weeks if possible) for the departure of the advocate. It is unfair to tell a child the week before the termination date that his friend is going away. The reason for the sep-

aration should be explained to the child as fully as his understanding permits and he should be reminded periodically of the approaching separation.

The advocate should be encouraged by the coordinator not to be too dramatic about the termination. Instead, he should present it as a normal part of living and make plans with the protege to stay in touch through phone calls, letters, cards, etc. The pair may want to plan special going-away activities together when they can exchange mementoes of their good times together. The advocate, too, may be going through a difficult time emotionally, and he may feel guilty about leaving his protege. It is the place of the coordinator to point out that the risk of loss is a part of everyone's life and that it can actually be a healthy experience for the protege if handled correctly.

If the protege still requires advocacy, the coordinator may want to introduce a new advocate into the situation before the first advocate leaves. An effort should be made to keep the transition to a second advocate smooth, maintaining as normal a situation as possible. The first advocate will want to introduce the second as a friend of his who wants to be a friend to the child, too. He will not take the place of the initial friend, who will remain in touch with the protege, but he will be a new, additional friend in the child's life to take him places and ensure his rights in the time to come. The same procedure for evaluation should be fulfilled by the new advocate as for the first advocate.

FURTHER REPORTING AND EXPANSION

After the six-month milestone has passed, the advocate can be more on his own in the relationship, but it is a good idea for the coordinator to stress that he report in some manner on at least a monthly basis. The advocate should use his own judgment in determining which critical incidents or other events in the relationship should be reported in the months that follow. Without unnecessarily interfering, the office should keep the lines of communication open through periodic phone calls and letters to be sure that the relationship is progressing smoothly.

Thus, the advocacy office can enjoy the mechanics of expansion — as one group of advocates completes the initial adjustment period and becomes more able to handle situations independently, another new group of advocates can be matched to proteges. The process of the growth of the program should be gradual: the quality of relationships is more important than the quantity. The local coordinator should not worry unduly over turnover of relationships as long as the majority of the matches continue. Ours is a highly mobile society, and advocates or proteges and their families will be moving from community to community. In such cases, the local

office should make an effort to involve them in advocacy programs in or near their new hometown by referring them to the proper channels. And, sometimes, relationships simply don't work out for reasons which are no fault of the local coordinator, who will have to be wise enough to encourage dissolution of a harmful or unsuccessful matching.

Another strategy for expansion of advocacy programs involves ongoing efforts at securing independent funding for offices. A "chain-link principle" can be applied:

- many programs begin with federal monies which are good sources for initiation of programs, but will not always be there to keep them going. One of the early and ongoing efforts of the coordinator should be to search out and secure more stable funding.
- when independent funds (from foundations, private donors, ARC budgets, etc.) have been secured for a program, the seed money (originally obtained from a federal source or through other channels) can then be shifted to start a new local advocacy office. This office in turn, with the guidance of the State Coordinator, should then begin to seek other means of funding.

EVALUATION

Ongoing evaluation of the Citizen Advocacy Program and its state and local advocacy offices is one of the most important portions of the endeavor. Without the proper systems for evaluation, it will not be possible to judge the strengths or weaknesses of the program, or to improve it as time goes on. Evaluative procedures should be built into every state and local office from the very beginning. The cornerstones for these procedures are the monthly activity reports of the advocates to the local coordinators, the monthly activity reports of the local coordinators to the state coordinators, and periodical reports from the state offices to the national project headquarters. Such reports should include facts and figures on: 1) number of matches made; 2) numbers terminated and why; 3) program problems encountered; 4) strategies to counteract difficulties; and 5) legal and employment situations involving advocates, proteges and the office, etc. (See sample coordinator's evaluation report form, Example I).

It is important that effective evaluative strategies are developed for local Citizen Advocacy programs. The staff of national, regional and state counterparts of NARC can be contacted for assistance in formulating effective plans. It is also important that a unified filing system be used for maintaining evaluative information. Evaluation of publicity strategies and of effects of the program on vari-

ous ethnic or low-income groups are especially important. Those setting up programs will find that they have a much better chance at solid funding if these and other evaluative procedures are included in their plans. Quarterly, semi-annual, and annual reports turned in to funding agencies, Advisory Committees, ARC Board, etc. also constitute good evaluative tools.

IN SUMMATION

The implementation of state and local advocacy offices is straightforward and efficient. An effective program requires talented, dedicated coordinators, supportive staff members, thorough publicity campaigns, community awareness and cooperation, intensified drives to locate proteges, careful selection and screening of advocates, sound basic training for advocates, accurate matchings, and ongoing monitoring and evaluation of the programs.

The role of the coordinator is the pivotal point for the success or failure of the program. As a coordinator, one will be called upon for everything from routine record-keeping to handling touchy, emotionally charged situations. It is very important that the coordinator not lose sight of the mentally retarded persons to be helped, the volunteers who are trying to reach out, and the overall goals of the advocacy concept. It is hoped that this book will help all those involved in implementing advocacy programs perform their duties effectively and with some measure of personal satisfaction.

EXAMPLE I

LOCAL CITIZEN ADVOCACY COORDINATOR'S MONTHLY REPORT FORM

Name of Coordinator: _____

Location of Office: _____

Current Date: _____ Reporting Period: From _____ to _____

A. Statistics on Advocates:

1. Number of advocates in program prior to this month.. _____
2. Number of applicants this month..... _____
   a. number accepted..... _____
   b. number rejected..... _____
   c. number pending..... _____
3. Number of advocates dropping out this month..... _____

   TOTAL NUMBER OF ADVOCATES NOW IN PROGRAM..... _____

B. Statistics on Proteges:

1. Number of proteges in program prior to this month... _____
2. Number of proteges referred this month..... _____
   a. number accepted..... _____
   b. number pending..... _____
3. Number of proteges dropping out this month..... _____

   TOTAL NUMBER OF PROTEGES NOW IN PROGRAM..... _____

C. Statistics on Relationships:

1. Number of advocate-protege relationships prior to this month..... _____
2. Number of relationships formed this month..... _____
3. Number of relationships terminated this month..... _____

   TOTAL NUMBER OF ADVOCATE-PROTEGE RELATIONSHIPS NOW IN PROGRAM..... _____

4. Total number of advocates assigned to following roles:

Advocate-Companion..... _____

Advocate-Adviser..... _____

Stand-by Advocates..... _____

Associate-Advocates..... _____

Other: (Guardian, Trustee, Conservator, etc.). _____

D. Summary of Office Activities:

1. Did your Advisory Committee meet this month? _____ If so, briefly summarize the results of the meeting or attach minutes of the meeting to this report: _____

_____

_____

2. What groups or organizations did you contact or make presentations to? _____

3. Generally describe the results of these contacts and presentations. _____

4. What types of publicity did your program receive? (Attach copies if possible) _____

_____

5. What significant problems did you encounter this month? _____

_____

6. What strategies did you employ to work them out? _____

_____

7. Are there any areas in which the State Citizen Advocacy Office can assist you? _____

_____

8. Other comments: _____

_____

Signed: _____
Program Coordinator

55

☆ U.S. GOVERNMENT PRINTING OFFICE: 1975-673-914